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Retirement

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Reporter

In the latest installment of The Ladder — a series by Financial Planning that looks at how executives and leaders in the wealth management industry made it to where they are today, and what you can learn from them — Andree Mohr discusses her journey to becoming president of Integrated Partners, an RIA with nearly $20 billion in AUM. Along the way, owning up to a mistake led to a teachable moment and, ultimately, career growth.

I hope you'll check it out, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Wednesday!

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TOP STORIES

PROFESSIONAL DEVELOPMENT

The Ladder: How owning an error led to career growth for Andree Mohr

The president of Integrated Partners reflects on how working through a misstep led to a life lesson — one that built a foundation for a solid career.

- **Goldman study emphasizes the power of a retirement plan**
  The Goldman Sachs 2024 Retirement Survey & Insights Report found that while competing priorities affected workers' ability to save, having a plan in place helped clarify goals and the grit required to meet them.
- **Financial advisors' confidence in the economy still shaky as election looms**
  The prospect of lower interest rates from the Federal Reserve helped buoy outlooks.
- **Majority of wealthy investors plan portfolio changes ahead of election, UBS finds**
  A recent UBS Investor Watch report highlights a deeply divided country in which many view the economy as the main issue this election season.
- **Ask an Advisor: Positioning investment management in a financial planning world**

Advisors suggested emphasizing that investment management and financial planning work hand in hand.

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